

Investment Property

In **Table 42**, enter details on any investment property you own.

Table 42: Investment Property

Property location (full address)	
Date purchased (closing date)	
Type of ownership (sole, community property, joint with right of survivorship, tenant in common, in trust, life estate)	
Name of any co-owner and percentage you own	
Purchase price	
Current estimated value (comparable property—see Zillow.com or Trulia.com)*	
As of date	
Purpose of investment (rental, flipping, other)	
Alarm location, code, and secret phrase	
Property improvements and repairs (description, permit info, date of improvement, cost of improvement, document location)	
Homeowners association (name, account #, and contact information)	
Renter's name and phone number (if applicable)	
Property management company name, contact person, and information	
Rental agreement (if applicable)	
Rental agreement terms (how long, monthly rent and method of payment, security deposit)*	
Location of documents (including real estate deed)	
Notes (include any easements and plans for the property):	

*NEXT STEPS

From the table above, enter the current value of your property in the asset section of your net worth statement (page 53). If there are any important dates relevant to the property, such as rental agreement expiration, add them to your financial calendar (page 53). Keep your deed, original purchase documents, permits, and documentation for major property improvements and repairs with your secure documents. Add copies of these documents to the real estate/property section of your GET READY! binder.